P21WWUG CONNECT 2026
SESSION DESCRIPTIONS

Accounting and Financial

Vendor Rebates: Strategy & Setup
Presented by Diane Arena, Spec-Tech Industrial Electric
Intermediate

Learn how we manage vendor rebates in P21, how to load and track them effectively, and how rebates impact your profitability analysis. This will mostly focus on customer/ item/discount group-based Vendor Rebates using Sales Price Pages in P21.

Implementing ACH in P21
Presented by Marc James, ESP International
Intermediate

The goal of the session is to enable attendees to setup ACH Payments in P21. We will also cover using Mass Updates to support setting up vendors.

System Settings - Payment Alert Types and Email Setup
Setup for Contact Role Maintenance
Setup for Contacts Maintenance
Setup for Vendor Class Maintenance
Setup for Vendor Maintenance
Setup for Bank Maintenance
Setup for Overrides and About Overrides
Some of our experiences to share
Different ways you may Authenticate with a bank
Mass Updates to Populate Contacts
Mass Updates to Populate Vendor and ACH Data

The Hidden P&L Leak: How Credit Card Processing Quietly Overbills Companies
Presented by Robert Day, weAudit.com
Beginner

Credit card processing is one of the most complex and least transparent expenses on a company's P&L, and it is also one of the most commonly overbilled.

In this session, Robert Day breaks down where overbilling actually occurs, why it often goes undetected even by strong finance and credit teams, and how processors profit from complexity, silence, and a lack of usable reporting. Attendees will learn the specific fee categories, downgrade triggers, and structural issues that quietly erode margin

WORKING COPY – NEW SESSIONS STILL TO BE ADDED

without showing up as obvious errors.

This session is designed for credit and finance leaders who want clearer visibility, stronger controls, and better questions to ask their processors. Attendees will leave with a practical framework for identifying risk areas, understanding what should be monitored, and knowing where internal teams typically lose leverage.

No processor pitches. Just straight talk on where the money goes and why.

Surcharging: The Hidden Risks, Real Math, and Smarter Alternatives
Presented by Robert Day, weAudit.com
Beginner

Surcharging is often presented as a simple solution to rising card costs. Cover the fee, protect margin, move on. In reality, it introduces customer backlash, compliance risk, contractual liability, and long-term revenue erosion that rarely show up in the initial math.

In this session, Robert Day walks through the real-world impact of surcharging using data, case examples, and financial analysis. Attendees will learn why most large companies avoid surcharging entirely, how customer behavior changes when fees are added, and where organizations underestimate the true cost of lost loyalty and reputational damage.

The session also addresses the compliance and liability risks tied to surcharging, including network rules, state-level restrictions, and processor contracts that often shift penalties back to the merchant. Robert then outlines smarter, lower-risk alternatives credit managers can evaluate to protect margin without damaging customer relationships.

Receivables in Action: Cash Collections, Credit & Dispute Management
Presented by Carolyn Hunt, Hunt Consulting Services
Intermediate

A hands-on look at AR best practices—cash collections, managing customer credit setups, and handling disputed invoices. Includes tips on customer down payments and how to fix them when they go wrong.

Handling Problems and Exceptions

Presented by Carolyn Hunt, Hunt Consulting Services
Intermediate

Handling problems and exceptions:

- Mis-shipments/mis-receipts
- Shipped wrong items

Dealing with the What-if's!
Presented by Carolyn Hunt, Hunt Consulting Services
Beginner

Demonstrating how to identify and resolve discrepancies caused by issues such as:

- Someone using an account that should be a controlled account
- An incorrectly entered payable
- A journal entry adjustment that throws things off balance
- How to correct an inventory adjustment that was done and the UOM was changed which caused inventory value to go out of balance
- GoLive data inaccurate – how to adjust

Preparing for an Audit: Documentation, Controls & Reconciliations
Presented by David Oster, TJ Snow Company, Inc.
Advanced

From internal controls to reconciliation strategies, this session will help you prepare for financial audits and reviews with confidence. We will concentrate on preparing for an audit from day 1 of your fiscal year, and will focus on the things auditors like to “Test” in your financials.

We will examine policies and procedures, and how well P21 can help you provide excellent support for your audit.

Getting Started with Financials in P21
Presented by David Oster, TJ Snow Company, Inc.
Beginner

This session will focus on setting up a financial statement in P21 from start to finish using P21 Financial Line Express Setup. We will look at how your financial transactions flow into P21, and how to capture this in meaningful statements.

P21 Commissions with Rules/Schedules/Quotas & Data Extracts
Presented by Jason Dunn, Galco Industrial Electronics
Intermediate

Learn how to use the core P21 Commission modules to manage your commission process efficiently. This includes setting up Rules with ascending and descending Breaks, creating Schedules using multiple Rules, and applying Schedules to salespeople with or without Quotas. We'll also cover finalizing commission amounts, posting them to the General Ledger, and extracting commission data for validation.

Bank Reconciliation & Cash Management in P21
Presented by Jennifer Sagan, Singer Industrial
Intermediate

A practical session covering bank reconciliation, reconciling cash accounts, and using P21 tools to manage cash flow. Includes cash collections and AR cash receipt tips.

Finance Priorities: Building Scalable Processes and a Data-Driven Culture
Presented by Peter Chrobak, Duncan-Parnell
Advanced

How can finance teams scale faster without creating more complexity, noise, or risk? In this thought-provoking session, Pete Chrobak of Duncan Parnell draws on his real-world experience as CFO to outline how finance leaders can build scalable processes while fostering a disciplined, data-driven culture. The session, which frames finance's evolution from a control function to a strategic enabler, highlights the CFO's role in setting the standards that allow the organization to grow with confidence. Join Pete as he outlines how to:

- Build team autonomy
- Prepare for analytics tools
- Create a reporting cadence
- Institute operational discipline

Strategic Storytelling for Finance: Influencing Decisions Across the Organization

Presented by Peter Chrobak, Duncan-Parnell
Advanced

Finance professionals influence more decisions than any other function in the organization—but influence doesn't come from data alone. It comes from the story behind the data. Strategic Storytelling for Finance: Influencing Decisions Across the Organization explores how modern finance teams use narrative, context, and audience awareness to drive alignment, build trust, and shape outcomes across every corner of the business.

This session reframes storytelling as a core leadership discipline for CFOs, Controllers, Finance Directors, Managers, and Staff. Participants will learn how to move beyond reporting and into communicating—crafting narratives that resonate with employees, owners, banks, customers, vendors, and strategic partners. Through real-world scenarios, we'll examine how storytelling strengthens hiring and retention conversations, supports mergers and acquisitions, clarifies strategic initiatives, and elevates board and owner communication.

At the heart of this approach are three habits: understanding your audience, being curious enough to ask why, and staying humble enough to adjust the message. These habits allow finance professionals at every level to translate complexity into clarity, tension into alignment, and numbers into decisions that move the organization forward.

AI-Powered Automation for Invoices, Orders, and Returns
Presented by Spencer Smith, Cascade Orthopedic Supply
Beginner

Discover how AI and Microsoft Power Platform deliver transformative automation in P21.

In this session, I'll show how we achieved over 90% automation for AP invoices/credit memos, emailed/faxed sales orders, and direct ship confirmations.

I'll also share our Center of Excellence approach to systematically identify and automate high-value processes across the business, such as customer notifications, supplier follow-ups, direct ship confirmations, and more.

Finally, I'll show the low operating costs for these automations and the strong ROI we've realized so far, including time savings, reduced errors, and freed-up team capacity.

Business and General Functionality

End-to-End Process Mapping in Prophet 21
Anjali McQueen, Sandesta Labs LLC
Intermediate

End-to-End Process Mapping in Prophet 21 is a practical, hands-on session designed to help attendees understand how their real-world business workflows translate into Prophet 21. Using key end-to-end scenarios such as Order-to-Cash, this class walks through how to map existing processes to P21 workflows, identify gaps, and determine where changes in process, configuration, or training are needed. Whether preparing for implementation or optimizing an existing environment, this session provides a practical framework to ensure Prophet 21 is enabling your business, not slowing it down.

Things you didn't know about your P21 system or may have forgotten
Presented by Michael Dean, Your Database Consultant
Advanced

This class will cover features of P21 that have been around and might have been overlooked or forgotten.

Pricing Service
Presented by Michael Dean, Your Database Consultant
Intermediate

This course will teach you how to use pricing services in P21 effectively. Pricing service is a powerful tool to build and update all things around item data in P21. Join to learn how to use pricing service to streamline your manual data updates.

Pricing Service - Creating Items
Presented by Michael Dean, Your Database Consultant
Beginner

This session will cover the different methods for creating items in P21, as well as cover tips and tricks for determining the best methods for your organization.

Managing Change with Prophet 21: ERP Adoption and Continuous Improvement
Presented by Anjali McQueen, Sandesta Labs LLC
Intermediate

Managing Change with Prophet 21: ERP Adoption and Continuous Improvement is a focused session for leaders responsible for driving adoption and results during a Prophet 21 implementation. Because P21 changes how work gets done every day, success depends on engaging people, not just configuring the system. This session shares practical strategies for building buy-in, setting expectations, and involving teams early through process alignment and targeted training. Attendees will leave with clear, actionable ideas to reduce resistance, accelerate adoption, and establish a foundation for continuous improvement that delivers lasting value from Prophet 21.

Project Hub: Transforming Project Management with Epicor
Presented by Candice Powell, Regency Supply
Intermediate

In today's fast-paced business environment, efficient project management is critical to success. This session delves into Epicor's Project Hub, a dynamic solution designed to enhance collaboration, streamline workflows, and improve project visibility across teams.

Through a hands-on walkthrough, attendees will discover:

- Key features and functionalities of Project Hub
- How it integrates with existing business systems
- Real-world use cases and best practices for implementation

By the end of this session, participants will have the knowledge to assess whether Project Hub is the right fit for their organization and how it can drive greater efficiency, accountability, and success in project execution.

Perfect for IT leaders, project managers, and business decision-makers looking to optimize their project management strategies with cutting-edge technology.

Customer Service: Leveraging P21 to Meet Customer Requirements
Presented by Candice Powell, Regency Supply
Intermediate

In today's competitive market, delivering exceptional customer service requires the right tools and processes. This session explores how to maximize Prophet 21 (P21)

functionality to empower front-line teams, improve customer interactions, and streamline operations.

Attendees will learn how to:

- Utilize business rules to automate workflows, reduce errors, and improve efficiency
- Leverage portals to provide real-time access to critical customer account information
- Optimize P21's capabilities to enhance responsiveness and customer satisfaction

Join us for an insightful session on how smart P21 strategies can transform customer service operations and create a seamless experience for both employees and customers.

Ideal for customer service managers, operations leaders, and P21 users looking to enhance customer engagement through technology.

Building a Prophet 21 Training Program that Delivers
Presented by Anjali McQueen, Sandesta Labs LLC
Intermediate

Building a Prophet 21 Training Program that Delivers is a practical session focused on designing training that translates directly into confident and competent user adoption. Attendees will learn how to align training to real job scenarios, prioritize what matters most, and ensure learning drives adoption rather than confusion. Attendees will learn how targeted onboarding and refresher training can decrease support tickets, improve data quality, and accelerate productivity for both new and existing Prophet 21 users.

Service Order Entry
Presented by Anjali McQueen, Sandesta Labs LLC
Beginner

Service Order Entry is an introductory session focused on the service module within P21, how it compares with the Order Entry module and how it can be used to effectively manage service operations. We will start with a quick review of system settings for the service module and then go on to explore scenarios such as adding multiple service items to an order, billing specific service items at a time versus the entire order, creating service note templates and understanding parts pick tickets versus service pick tickets.

Profitability Pressures & Pricing Strategies
Presented by Aaron Pace, NovumDMS (dba for Insytes)
Intermediate

Margins are tighter, things are moving faster, there are tariffs, customers are louder, and pricing is everyone's shadow problem, but nobody's clear responsibility. This session is for operators, buyers, pricing managers, and anyone who's ever had to explain why "margin erosion" is anything but a spreadsheet problem. We'll walk through real-world scenarios where profit leaks happen: freight creep, surprise cost changes, sloppy price overrides, unit of measure mismatches, and contract pricing that everyone's forgotten about. You'll learn how to build margin clarity across teams and run pricing processes that survive real-world chaos. And, most importantly, stop giving away profit without realizing it. No hype or software pitches, just a guy who's rebuilt too many price books and learned the hard way how to keep margins from bleeding out on the dock. If you've ever been told to "hold the line on pricing" or reduce cost with broken tools and bad data, this one's for you.

Go Live Data Conversion - Do's and Don'ts
Presented by Carolyn Hunt, Hunt Consulting Services
Beginner

You are on a new adventure of moving from a legacy business system to Prophet 21. This session will help you lay out a game plan for implementing Prophet 21 that will be right the first time, avoiding rework and setting up your system to meet your company's business model. We don't all do things the same way; ensuring you have considered options available to you to achieve your goals makes for a smoother transition. We will review best practices setting up core data as well as understanding how to best extract and import data from your legacy system to P21. We'll review timelines for when to load static data vs dynamic and make sure you understand what is required for go live to avoid last minute changes to your processes. If you are a new P21 customer and have not yet gone live, this class is for you.

Presenting Yourself with Impact
Presented by Lisa Nausley, Looper & Associates
Intermediate

How to create compelling content.

Ways to keep your audience engaged.

Projecting confidence, professional presence and belief while honing your skills.

A lack of talent is irrelevant to great success...so what is the secret?

Effective Communication
Presented by Lisa Nausley, Looper & Associates
Intermediate

Effective Communication is a multi-step closed loop process used to increase clarity and the ability to be readily understood.

It is not what you say, but how you say it that will determine how your message is received.

Understand the factors that influence interactions.

Explore methods of soliciting and providing feedback as a means of completing the communication process and building open and trusting relationships.

Understanding Dates in P21
Presented by Carolyn Hunt, Hunt Consulting Services
Intermediate

Dates can make or break your workflow. Learn how key dates (order, promise, ship, production, and more) interact throughout the system and how they affect reporting, purchasing, and customer satisfaction.

AI Demystified: What Every Distributor Needs to Know
Presented by Meghan Richardson, Hallman Consulting & Services Ltd.
Beginner

Consider this your AI 101 for distribution. AI has been around for over 70 years — so why does it still feel like a mystery? This session cuts through the noise: what AI actually is, which types matter most for distributors, and how to separate substance from hype. No vendor pitches — just the foundation you need to move forward with confidence.

Is Your Data Ready for AI? What Distributors Need to Get Right First
Presented by Meghan Richardson, Hallman Consulting & Services Ltd.
Intermediate

Here's what nobody tells you before you invest in AI: the tool doesn't matter if your data isn't ready. Most failed AI initiatives trace back to data issues, not technology. This session gives you a structured readiness framework built for distributors — so you know exactly where to look before you spend a dollar on any AI solution.

Leading Without Authority
Presented by Lisa Nausley, Looper & Associates
Intermediate

Understanding Influence vs. Authority: Defining leadership as influence and impact, not a title or position.

Taking initiative and Being Proactive: Encouraging participants to identify problems, propose solutions, and act without waiting for formal permission.

Effective Communication and Persuasion: Mastering clear, concise, and persuasive communication to articulate ideas and inspire action.

The Mindset of Gen Z: How to Build the Next-Gen Talent Pipeline
Presented by Steven Ebel, Texas A&M University
Beginner

In this engaging session, Steven Ebel explores effective strategies for developing a robust talent pipeline tailored to the unique perspectives and expectations of Generation Z. Drawing on recent research, industry best practices, and his experience recruiting students at Texas A&M University, Mr. Ebel will highlight what motivates Gen Z students and professionals, how they approach work and learning, and what organizations can do to attract, retain, and empower this emerging workforce. Attendees will gain practical insights into aligning organizational cultures, career paths, and recruitment efforts with Gen Z's values, preparing companies to successfully cultivate their next generation of leaders.

How to Network (Scientifically): Strategies for Building Powerful Professional Relationships
Presented by Willy Bolander, Texas A&M University
Beginner

For years, professionals have heard the importance of networking but rarely receive actionable advice on how to truly do it well. In this engaging breakout session, Dr. Willy Bolander cuts through the confusion by sharing evidence-based strategies drawn from leading research in social network analysis. Participants will discover how relationship patterns within their organizations connect to career-advancing resources, and gain practical, research-backed tips for building these valuable connections. Whether you're an industry veteran or early in your career, Dr. Bolander will provide you with the scientific tools you need to create meaningful relationships that translate into lasting success.

The Art of Persuasion: Mastering Influence in Business and Everyday Life
Presented by Willy Bolander, Texas A&M University
Beginner

In this engaging presentation, Dr. Willy Bolander explores the science and art of persuasion. Drawing from cutting-edge research in sales and leadership, Dr. Bolander demonstrates practical strategies for effectively influencing outcomes in professional settings, such as sales negotiations, team management, and peer collaborations. Attendees will gain actionable insights into adapting influence tactics to different situations and personalities, empowering them to build stronger relationships, drive better results, and lead with integrity in both the boardroom and beyond.

AI-Powered Customer Service: Automating 50% of Inquiries Across All Channels in P21
Presented by Spencer Smith, Cascade Orthopedic Supply
Beginner

Discover practical ways to deploy AI-powered virtual agents/bots to all channels (phone, email, chat, SMS) that automatically handle your most common customer inquiries—such as creating simple orders/returns, status checks, pricing lookups, and account details.

In this session, I'll walk through real-world implementations, showing how these agents deliver instant, accurate responses, maintain conversation context across channels, and intelligently escalate complex issues to human agents—reducing response times, cutting support costs, and improving customer satisfaction.

Leave with actionable strategies to roll out similar omnichannel AI agents in your business, scaling self-service efficiently without sacrificing quality.

Using AI in P21 to Increase Productivity, Reduce Costs, and Grow Revenue
Presented by Justin Johnson, Motivate
Intermediate

This session shows P21 users exactly how AI can be applied inside their ERP to save time, lower operating costs, and generate measurable revenue growth.

You will learn how to:

- Identify high friction workflows in P21 that limit rep productivity
- Quantify time per order, labor allocation, pricing accuracy, and margin exposure
- Measure Productivity gains, Cost reductions, and Revenue growth using your own ERP data
- Establish practical evaluation criteria before selecting an AI solution

We will review three P21 compatible applications:

- Sales Order Automation to streamline order processing and reduce pricing errors
- Sales Insights to analyze historical P21 data and surface revenue opportunities
- PO to Cart to convert emailed purchase orders into structured digital transactions inside P21

Attendees will leave with a structured ROI framework, defined operational benchmarks, and practical use cases they can assess immediately within their own organization.

Using DynaChange to Create an On-Screen Approval Process
Presented by Tyler Crane, BizXcel Inc
Intermediate

In this engaging session, we will explore the creation of an efficient on-screen approval process using ScreenDesigner and DynaChange. Learn how these powerful tools enable seamless workflows, ensuring team members receive the necessary approvals before advancing to the next step in critical processes. This approach is particularly valuable for Return Merchandise Authorizations (RMAs), where accuracy and collaboration are key.

Join us for an in-depth look at how this approval workflow was designed, and see it in action to understand how it can enhance team collaboration and drive operational

efficiency. Don't miss out on this opportunity to discover how to streamline your approval processes and improve overall productivity!

Automation Studio Third-Party Integration with Zoho Field Service Management (FSM)
Presented by Lucas Blancher, BizXcel Inc.
Intermediate

This presentation explores the two-way synchronization of Prophet 21 Service Orders with Zoho Field Service Management (FSM). It covers how the integration was designed and built using Automation Studio, enabling service technicians to manage their day-to-day work in FSM while managers and office staff continue working in Prophet 21.

The session also examines the rationale for using Automation Studio as the integration platform and shares practical lessons learned, including challenges and limitations encountered, mistakes made, and improvements to consider when building complex integrations between independent systems.

Running Prophet 21 in a NIST 800-171 World: Avoiding the Distributor Compliance Trap
Presented by Austin Justice, CMMCComplianceGuide.com
Beginner

Many aerospace and defense distributors assume cybersecurity requirements only apply to manufacturers or DoD primes. In reality, the moment you store or transmit customer specifications, certs, test reports, purchase orders, technical data, or flow-down documentation in Prophet 21 and related systems, NIST 800-171 expectations can follow even without a direct DoD contract.

Compliance risk often doesn't come from the ERP itself, but from the systems around it: email, shared drives, portals, scanners, warehouse devices, and integrations that handle sensitive documentation.

In this session, we'll explain where distributors unintentionally fall out of alignment, what customers and assessors are actually looking for, and how to strengthen your environment without disrupting day-to-day operations. You'll leave with a practical framework for protecting your business while continuing to run Prophet 21 effectively.

Mobile Proof of Delivery - Epicor vs Elite Extra
Presented by Jeff Poss, Auer Steel & Heating Supply
Beginner

What are the differences between Epicor's original Mobile Proof of Delivery and the Elite Extra solution?

This class will go over and demonstrate how each program works + what makes each one different.

We will talk through the process and concepts of:

- Driver setup
- Route creation
- Driver / Customer experience
- Tracking / details
- P21 settings and integration

We will also spend time looking at Elite Extra in depth in the following areas:

- System overview and layout
- Dispatch process
- Route creation options
- Driver / Customer experience
- Live delivery tracking
- Driver details and reporting
- Communication and alerts

Time for Q&A

Building a Data Driven Company
Presented by Lucas Blancher, BizXcel Inc.
Beginner

This presentation will explore how to build a data-driven culture by focusing on key teams, technology, and processes. Key topics include empowering teams with self-service models, performance metrics, and fostering a mindset that values data and information. By the end, participants will have strategies to integrate data throughout their organization and drive performance.

Inventory and Purchasing

Work Orders, Production Orders & Assemblies
Presented by Jason Bail, Building Controls and Solutions
Intermediate

An overview of production order management—creating, setting up, and closing production orders. Learn how assemblies and light manufacturing tie into inventory and costing.

Managing Multiple Warehouses in P21
Presented by Jason Bail, Building Controls and Solutions
Intermediate

Explore how to set up and manage multiple warehouse locations. Learn how processes such as purchasing, receiving, transfers, and invoicing change when expanding to offsite or regional facilities.

Assemblies, Production orders and Kits
Presented by Amanda Martinez, C-Line Product, Inc.
Beginner

This session provides a practical walkthrough of working with assemblies, kits, and production orders in Prophet 21, with a focus on inventory-driven processes. Attendees will learn how to create and maintain assemblies and kits, including key setup options, component behavior, and considerations when using Assembly on the Fly during order entry. The class will also cover production order processing, from initial setup and system settings through confirming, canceling, and mass-processing production orders. Along the way, the session will highlight tips, common pitfalls, and helpful features to support real-world manufacturing and distribution workflows in Prophet 21.

Secondary Process Setup
Presented by Amanda Martinez, C-Line Product, Inc.
Beginner

This session walks through the setup and use of Secondary Processing in Prophet 21, focusing on how to move inventory through additional processing stages to create finished goods. Attendees will review key system settings, company and item maintenance requirements, and process maintenance options, including costing

methods and routing. The class also covers the three ways to create secondary processes—manually, through Order Entry, and via Purchase Order Requirements Generation (PORG)—along with guidance on starting, moving, canceling, and tracking processes. Practical examples and real-world considerations will help users better understand visibility, costing, and workflow management within Secondary Processing.

Vessels & Containers
Presented by Josh Novotny, The HMJ Group
Beginner

This course provides a focused overview of how to configure, manage, and optimize Vessels and Containers in P21. Participants will learn how to enable vessel and containers functionality, build and manage vessels, receive containers, and apply landed cost drivers to accurately allocate freight and related charges.

We will also cover ways to view and report on vessel data, monitor shipment activity, and explore automation options for creating vessels to improve efficiency and reduce manual processes.

By the end of the session, attendees will understand how vessels and containers support purchasing, receiving, and inventory costing within P21.

Inventory Replenishment & Purchasing Settings
Presented by Aaron Pace, NovumDMS (dba for Insytes)
Intermediate

Most inventory problems are about decisions, not demand. Bad lead times, broken replenishment logic, old safety stock settings, and min/max values that haven't been touched since COVID are all contributors. This session is for buyers, planners, and operations leads who've had to explain why a critical item is out of stock while the warehouse is full of dead inventory. We'll break down the core settings that drive purchasing behavior inside Prophet 21 and how they go sideways in the real world (and in Prophet 21). You'll learn how to spot the invisible assumptions in your data and fix forecasting traps while building replenishment rules that fit your business and work with the system. This is a practical, deep dive into how to prevent stockouts, reduce excess, and keep your purchasing team from flying blind while simultaneously keeping the financing people happy. If you've ever inherited settings that made no sense, this session will help you take the wheel.

Analyzing Buying Opportunities to Maximize Profitability
Presented by Jon Schreibfeder, Effective Inventory Management, Inc.
Intermediate

Every distributor has a limited amount of money to invest in inventory. Vendors present distributors with many buying opportunities: additional discounts, extended payment terms, free-freight, return allowances, etc. In this session we will:

- Demonstrate proven methods for evaluating each vendor offer.
- Show you how to manage your total inventory investment to maximize profitability.
- Examine how to effectively use available storage space in your warehouse.
- Establish your company's inventory budget for each of the upcoming 12 months.

Stocking to Please Customers While Meeting Your Return On Investment (ROI) Goals
Presented by Jon Schreibfeder, Effective Inventory Management, Inc.
Intermediate

The goal of effective inventory management (EIM) is to meet or exceed your customers' expectations of product availability. Salespeople often state that their customers expect you to have any product they might want, in any quantity, available for immediate delivery. In the session we will demonstrate how to achieve the goal of EIM while not wasting money on unneeded stock. Topics will include:

- How to determine your customers' needs and if their expectations are reasonable.
- Establishing an approved stock list for each of your locations and warehouses.
- Creatively stocking products to meet your customers' expectations while maximizing your profitability.
- When filling orders from a central warehouse is the best way to meet customers' needs.

Effective Seasonal and Event Stocking
Presented by Jon Schreibfeder, Effective Inventory Management, Inc.
Intermediate

Stocking products with seasonal patterns of usage as well as those that experience high sales or usage due to an event is a challenging task. Simple forecasting formulas that base future demand estimates on what was sold /used during this month, and the following month(s), last year often produce inaccurate results. This leads to you having

the wrong quantity, of the wrong item, in the wrong location, at the wrong time. In this session we will show how to combine past sales/usage history, as well as collaborative information from customers, salespeople, vendors and other sources so that you are properly stocked to fulfill customer demand in these challenging situations.

Efficient Warehouse Operations
Presented by Jon Schreibfeder, Effective Inventory Management, Inc.
Intermediate

Every distributor has one or more warehouses. But few realize that efficient and effective warehouse operations are a key element to success and profitability. In this session we will explore how a few simple practices will help you ensure that the on-hand quantities of stocked products are consistently accurate and that you efficiently store items in order to minimize the cost of filling orders. We will also include ideas for establishing efficient product storage locations and streamlining the order fulfillment process. Included will be a presentation of a cost/benefit analysis of implementing new material-handling technology.

Units of Measure: Setting up multiple UOM per item
Presented by Sharon Sale, Flodraulic Group
Beginner

This class is good for new P21 users and new P21 customers. It will review how Units of Measure are used throughout the system. From setting up the Item Maintenance Screens, to how P21 uses the default Units of Measure that affect everything from Usage, Purchasing, Sales Pricing etc. We will talk about the math required to handle complicated conversion factors. We will also address how UOM change can affect your on-hand Inventory valuation.

Maintaining Supplier Pricing
Presented by Barry Hallman, Hallman Consulting & Services, Ltd.
Beginner

Every time the economy grows, shrinks, or undergoes any change, distributors receive a constant stream of price changes from their suppliers. Keeping up with all these changes can be very challenging and time-consuming, and the impact can be financially significant. This session will review the tools provided in the Prophet21 application (Pricing Service and Mass Update), and certain third-party solutions* that are also available. We'll discuss the relative advantages and "best use" examples of each. (*

Third-party applications are not included in P21, and are purchased separately from developers.)

Managing Vendor & Supplier Information Efficiently
Presented by Carolyn Hunt, Hunt Consulting Services
Beginner

Learn how to use the vendor master inquiry screens (like F2 and F8) to quickly access supplier data, pricing, and performance metrics.

Introduction to Service Orders
Presented by Holli Ilko, The HMJ Group
Beginner

This course provides a general overview of Service Orders from setup to entry in P21. Participants will learn how to create Labor, Technicians, Service Items and Service Orders from quote entry to conversion and service order completion.

We will also cover ways to be more efficient within Service Order Entry by looking at Serial Number searching, adding parts from a parts list, copying parts and labor, note templates, and Previous Requests.

By the end of the session, attendees will understand how to complete the setup and general management of Service Items and Orders within P21.

Inventory System Settings
Presented by Neil Vanwalbeck
Advanced

This session will review system settings as well as new settings for inventory management, mainly for the UPTO dynamic purchasing method, as well as velocity settings and new features

How to Manage ABC Classes for Purchasing
Presented by Neil Vanwalbeck
Advanced

This session will review basic ABC classes, to advanced classes, such as location-based classes, classes to maintain new stock items, to put away classes used to help locate fast moving items in the warehouse to using for cycle counting

WMS Best Practices (Bins, Pick Zones, Putaway zones etc.)
Presented by Neil Vanwalbeck
Intermediate

This session will cover suggested bin formats, zones needed for WMS, system setup as well as workbench setup and function

Inventory Discipline in a Cost-Volatile Market
Presented by Josh Bartel, Hydrian Inventory Optimization
Intermediate

Distributors are facing sustained cost pressures beyond tariffs, including raw material volatility, energy price shifts, freight costs, and wage inflation. All of which are placing additional strain on margins and working capital. While these external factors are largely uncontrollable, the configuration of inventory policies within the ERP is not. This interactive session will explore how buyers and leadership teams can align replenishment parameters, lead times, safety stock, and governance routines with clear financial objectives in a cost-volatile environment.

Attendees will leave with practical evaluation frameworks to protect margins, reduce excess inventory, and improve cash flow, using capabilities already available in their systems.

Learn The Basics Of Using Service Contracts and Preventive Maintenance Schedules To Improve Your Service Business
Presented by Chad Bralley, Flow Control Group
Beginner

These underused features in the Service & Maintenance module can help you improve your service business and reduce redundant data entry. In this session we will look at how Customer Contracts can help control pricing on service orders for service items covered by contracts. We will also dive into how to automate billing for the contract

itself on a schedule. Then we will see how preventive maintenance schedules can help you generate all the orders for your PM agreements, including the parts and labor details, without keying each one individually.

Pulling Information Out of Data
Presented by Jon Schreibfeder, Effective Inventory Management, Inc.
Intermediate

Fifty years ago, distributors had to search for data necessary to make informed decisions that would lead to the success of their businesses. Today, the opposite is true. You must search through overwhelming amounts of data to find the information that will help you make intelligent decisions. In this session we will explore how to find and utilize intelligence in the available data in your business environment and P21 system.

IT and System Administration

Business Rules from Intermediate to Advanced
Presented by Brad Vandenbogaerde, AMTS Canada
Intermediate

You now have written a few business rules and want to know what else you can do with them from scheduling a business rule, triggering a rule from an alert in P21, to logging output from your rule to diagnose issues, basic workflow rules to more advanced rules that integrate 3rd party libraries and the New Visual Attributes Class. How do the rules function in a SaaS environment and what are some of the limitations of SaaS with business rules

Using Alerts in P21
Presented by Sam Snow, TJ Snow Company, Inc.
Intermediate

This session will discuss how to use alerts already built into P21, as well as custom SQL alerts.

SQL Jobs moving from On-Prem to Cloud
Presented by: Michael Dean, Your Database Consultant
Intermediate

TBA

P21 Next Level - purpose-built reporting platform connecting directly to your Prophet 21 SQL Server database
Presented by: Mike Cali
Intermediate

If your team is still exporting P21 data into Excel, waiting on Crystal Reports, or paying for SSRS subscriptions and Dynachange portals just to answer basic business questions — there's a better way.

P21NextLevel is an independent, purpose-built reporting platform that connects directly to your Prophet 21 SQL Server database. Every page is live — no exports, no scheduled refreshes, no middleware. Just your data, in real time, in a browser.

Every one of these reports is live and running today:

- **Cash Conversion Cycle** — How many days to turn a PO into cash. Tracks inventory age, DSO, and DPO in a single view.
- **Customer Aging & DSO** — AR buckets across 30/60/90/120/150 days with per-customer days sales outstanding.
- **Who Bought What** — Every invoice line for the last 365 days: customer, item, price, COGS, and margin.
- **Sales Trend Analysis** — Period-over-period comparisons from your Sales Master data — no spreadsheet required.
- **Profit Exception** — Surface order lines where margin falls outside expected range. Catch below-cost sales before they compound.
- **Sales History** — Revenue, COGS, and gross profit by item, customer, and branch.
- **Safety Stock Setup** — Data-driven safety stock levels to balance stockout risk against carrying costs.
- **Supplier On-Time Delivery** — Required vs. actual receipt dates so you know which suppliers are driving your stockouts.

- **Turn & Earn** — Rank every item by turns × margin. Find your stars and your dead stock.
- **Service Orders & Actual vs. Estimate** — Compare estimated vs. actual cost and price on production orders.

No Crystal Reports. No Excel exports. No SSRS. No Dynachange portal.

P21NextLevel runs directly against your live P21 database — the same data, the same moment, accessible to your whole team without add-on software or reporting licenses.

P21NextLevel is not affiliated with Epicor Software Company.

Cool Business Rule Ideas
Presented by Michael Dean, Your Database Consultant
Advanced

This class will cover cool ideas for business rules. We will discuss rules we have made for other companies. We will also discuss things that can and cannot be done with business rules as well as things to watch out for when making business rules. The class will be intended to help get you started with making business rules or give you ideas to make your business rules even better.

Getting Data into P21
Presented by Michael Dean, Your Database Consultant
Intermediate

This session will be a review of how to load data into P21 using mass updates, imports, API's, and pricing services.

UPS Integration
Presented by Michael Dean, Your Database Consultant
Intermediate

This session will be a review of the UPS Integration in P21 and a discussion about the differences when using Epicor's Azure environment.

FedEx Integration
Presented by: Michael Dean, Your Database Consultant
Intermediate

This session will be a review of the FedEx Integration in P21 and a discussion about the differences when in Epicor's Azure environment.

Using M365 Power Automate with P21
Presented by Brad Vandenbogaerde, AMTS Canada
Advanced

How can Power Automate be used as a tool to perform automation, advanced workflow tasks, and even some AI stuff with your P21 environment....harnessing Power Automate and combining it with the P21 API to build workflows with some real purpose!...some ideas thrown in there for good measure if you are sitting on the fence on what an automation toolset could do for your organization

Data Conversions for GoLive and Mergers and Acquisitions
Presented by Barry Hallman, Hallman Consulting & Services, Ltd.
Beginner

There are many ways to approach a data conversion for a new Prophet 21 or for an existing one that has merged/acquired a new company. Some of the techniques are proven tried and true, some are innovative, and some are littered with traps and potholes. Come to discuss the various methods that you've used, or to ask questions about developing your own process.

DynaChange 101: Getting Started
Presented by Spencer Welch, Your Database Consultant (YDBC)
Intermediate

An introduction to DynaChange tools — Screen Designer, Menu Designer, Navigator, and more! Great for first-timers or a refresher.

Harnessing AI in Practice
Presented by Jim Mocker, Spec-Tech Industrial Electric
Advanced

Explore practical examples of AI applied to P21 data — from anomaly detection to forecasting and reporting automation.

DynaChange Advanced: Tabs & Joins, Pop-up Designer, and more!
Presented by Spencer Welch, Your Database Consultant (YDBC)
Intermediate

Explore more complex DynaChange options, including table joins, tab designer, and more to tailor your system to your business needs.

Business Rules: Beginner
Presented by Spencer Welch, Your Database Consultant (YDBC)
Intermediate

Get started with writing and modifying business rules to customize P21 to your business needs and your workflows or validations.

Visual Rules A-Z
Presented by Spencer Welch, Your Database Consultant (YDBC)
Intermediate

Explore Visual Rules, from setup through practical examples. Learn how to integrate them with APIs to create powerful automations.

Epicor Cloud vs On-Prem: Planning and Understanding
Presented by Spencer Welch, Your Database Consultant (YDBC)
Intermediate

An unbiased comparison of hosted and cloud environments - and what we know of what's to come. We will look at what to consider for transitioning and what limitations you may have as well as possible work-around solutions.

Business Rules Are Dead: Long Live the AI Agent
Presented by Mike Cali, Belmont Equipment and Technologies
Advanced

The .NET business rules engine inside your ERP wasn't a bad idea — it was the *right* idea for its time. A way to take messy, human business logic and lock it into repeatable, auditable code. The problem? That time is over. AI coding agents can now generate, explain, test, and deploy business logic from plain-English descriptions in the time it takes your current process to write a requirements doc. This class tears down the old mental model, shows you exactly what's replacing it, and hands you a concrete path forward — so you're leading this transition, not getting dragged through it.

By the end of this session, attendees will:

- Understand the structural argument for why traditional business rules engines in systems like P21 are becoming architectural liabilities — not just legacy inconveniences
- Recognize the specific capabilities of AI agents and cloud-native development tools (Claude Code, GitHub Copilot, cloud IDEs) that map directly onto — and surpass — what a .NET rules engine does today
- Be able to describe a realistic AI-first workflow for building and maintaining ERP business logic, from natural-language requirements to deployed code
- Identify the skills and mindset shifts required to remain relevant and effective as this transition accelerates through 2025 and beyond
- Walk out with one concrete experiment they can run in their own environment within the next 30 days

Mass Updates (Basic)
Presented by Missy Roth, The HMJ Group LLC
Beginner

Safely Export, Edit, and Re-Import Data Using Excel

Learn how to confidently manage bulk data changes in Prophet 21 using Excel. This session walks through the safe export, structured editing, and controlled re-import of P21 data, with a focus on minimizing risk and maintaining data integrity. Ideal for new administrators and power users, attendees will gain practical tips, validation techniques, and troubleshooting strategies to perform mass updates efficiently and accurately.

A Practical AI Discussion - Where does AI fit into Distribution?
Presented by Mike Cali, Belmont Equipment and Technologies
Advanced

You've built your business on Prophet 21. You've stretched it with Excel, extended it with PowerBI, customized it with Business Rules and DynaChanges, and bolted on portals to fill the gaps. And yet — there are still gaps. Processes that require too many manual steps. Reports that take too long to build. Logic that lives in someone's head instead of the system.

This one-hour discussion is for distribution companies who are ready to explore how AI can finally close those gaps — not by replacing the tools you rely on, but by connecting them in ways that weren't possible before.

Every company in the room runs P21 a little differently. That's the point. AI doesn't force you into a one-size-fits-all workflow — it meets you where you are, adapts to your specific business logic, and helps your team move faster, decide smarter, and stop doing things manually that a machine could handle in seconds.

In this session, we'll have an honest, practitioner-level conversation about where AI fits in a real distribution environment — across operations, sales, purchasing, and customer service — and what's actually possible right now, today, with the tools already available to you.

An introduction to SQL Server Indexes and Statistics
Presented by David Klee, Heraflux Technologies
Intermediate
Hybrid Presentation

One of P21’s most compelling strengths is its ability to be customized to fit any business process. But, that same flexibility can amplify inefficiencies in the underlying database, posing a significant performance challenge. Properly indexing the P21 database allows the SQL Server engine to mirror the way your organization actually works with the data. While fine-tuning indexes blends art with science, this session will teach you the scientific side: how to measure and monitor index-usage patterns so you can become an indexing expert and accelerate P21 performance without touching queries or application code. Using a handful of free scripts and tools, we’ll demonstrate how to pinpoint the biggest resource consumers and dissect execution plans to uncover

hidden bottlenecks. Walk away with practical techniques to make P21 run faster and more efficiently.

SQL Query Writing
Presented by Barry Hallman, Hallman Consulting & Services, Ltd.
Beginner

Getting information out of the Prophet21 database can be accomplished by writing SQL queries that extract the data from the SQL database, and present it in many forms to the user. This requires writing SQL query code. The session will provide a database overview, examples of coding techniques, samples of query syntax, and suggestions of where users may find the data they want in the P21 database. No prior experience is required.

Using SQL, Business Rules and SISM for P21 Automation
Presented by Thomas Bodary, MindHARBOR, Inc.
Advanced

Discover how to automate recurring tasks and improve data flow by using SQL jobs, stored procedures, SISM Imports, Task Scheduler and other time saving tools. This session does NOT cover Automation Studio.

P21 API – A non-programmer's intro to the P21 API
Presented by Felipe Maurer, Hydradyne
Beginner

This session aims to give people an introduction to the P21 API. It is specifically geared to require no prior programming experience.

What we are going to do:

- Talk a little about the P21 API & the documentation on the middleware site
- Cover the tools you can use to make API calls
- But most importantly we will jump right into making API calls
- We will do this in a programming language agnostic way
    - So it doesn't matter if you prefer Python or .Net it will all apply to everyone
- But the P21 API is also too broad to cover in one session.
    - So not all examples will apply to everyone.
- So with that in mind: I will also cover the API calls that will teach you how to make the API call you want.

- The API call that shows you the required data.
- So that if we don't cover the exact scenario you are looking for we will cover how to get the information you need to be able to make that API call work.

P21 API - Intermediate Prophet 21 API Development
Presented by Felipe Maurer, Hydradyne
Intermediate

This session provides a high-level overview of intermediate concepts involved in working with the Prophet 21 API. The discussion will expand beyond basic requests and responses to explore how the API is structured and how common business processes are represented within it. Topics will include authentication concepts, order structure and sequencing, and general patterns used when interacting with transactions and records through the API. The goal is to provide a clearer understanding of how the system operates so developers can design more effective integrations.

We will cover some intermediate topics, like: keys, pop-ups, pdfs/forms, user defined tables, etc.

SQL Server Upgrades
Presented by David Klee, Heraflux Technologies
Intermediate
Hybrid Presentation

SQL Server releases move from mainstream to extended support and eventually reach end-of-life on a regular cadence. SQL Server 2016, for instance, entered retirement this past July. Are you prepared for the next upgrade? This session walks you through a proven, "clean" migration strategy: provision a new server, transfer the data and other objects, and point P21 at the new instance. We'll cover the critical pre-migration checklist, sizing considerations, licensing implications, and the various techniques you can use to perform the move—whether you're targeting the cloud or an on-premises environment. After the cutover, we'll show you how to validate the new platform to ensure everything runs smoothly. Join us for practical, field-tested tips drawn from more than 25 years of SQL Server upgrade experience, and leave ready to execute a seamless, reliable upgrade.

SQL Server Health Checks for P21
Presented by David Klee, Heraflux Technologies
Intermediate
Hybrid Presentation

You don't need to be a database wizard to keep the P21 SQL Server database performing at its best. In this deep-dive session we'll guide you through a systematic investigation of both the SQL Server instance and the P21 database itself. You'll learn why and when an upgrade makes sense, how to trim unnecessary licensing costs, and which configuration knobs—such as instance settings, parallelism, and non-default performance tweaks—can unlock hidden scalability. We'll also explore database-level diagnostics that reveal how your organization actually uses the P21 database and pinpoint concrete opportunities for improvement. Throughout the presentation you'll receive ready-to-run scripts, practical tips, and architectural best-practice concepts that enable you to conduct a comprehensive health check of your P21-SQL Server environment and drive measurable performance gains.

Reporting

Epicor's Grow BI - Building dashboards, deploying information and building a report strategy
Presented by Jeff Poss, Auer Steel & Heating Supply
Intermediate

This session will focus on Grow Business Intelligence. This class has nothing to do with the new Grow tools (Grow AI, Grow Item Advisor, etc.)

After you've seen the demos and after you've potentially even signed up for Grow - where do you go next? This class will go through concepts and live demonstrations around the following:

User setup and maintenance
- Security considerations
- Roles and what their different access rights are.
- Individual vs mass creation.

Data Connections, Warehouses and Datasets
- What are all the differences?
- Understanding refresh rate.

- Creating / Publishing a Dataset.

Dynamic Variables
- The use + the downside of structuring your dashboards with these.

Dashboards
- Creation, organization and structure of metrics inside the dashboard.
- Dashboard folders and organization of Dashboards.

Publishing Information
- Sharing metrics, dashboards and information.
- Integrating with P21 other outside sources.

Time for Q&A

Report Studio for Portals and Reports - Basic and Beyond
Presented by Spencer Welch, Your Database Consultant (YDBC)
Intermediate

Learn how to design, publish, and maintain user portals or reports in P21 using Report Studio. We will cover the basics of understanding data sources, filters, and parameters. Great for data at a glance or detailed lists. We will look at how to get reports you need without SQL knowledge and how to expand them even further with a little SQL knowledge.

Create a Power BI Dashboard from Prophet 21
Presented by Tyler Crane, BizXcel Inc
Beginner

Power BI allows companies to gain incredible insights into their organization and is widely available for customers who use Office 365. In this session, we will show how to connect Power BI to the Prophet 21 database, extract data and link that data together. It will also cover building a sales dashboard to review customer sales. The session will also cover some of the ideas that need to be looked at when planning a Power BI deployment for your organization.

Crystal Forms – Customization Basics
Presented by Barry Hallman, Hallman Consulting & Services, Ltd.
Beginner

The Crystal forms that are provided by Epicor display data that has been deemed appropriate in a form that mirrors the legacy forms that preceded them. However, your company may need different data, and a better presentation than the baseline forms offer. By using Crystal Reports to modify the forms, extensive customizations can be made, but in order to make these changes, there is some necessary understanding of the customization process. This session will cover the basics of Forms Customization as well as discussion of best practices for customization and version management. No prior experience is required.

Crystal Forms – Customization Advanced Topics
Presented by Barry Hallman, Hallman Consulting & Services, Ltd.
Intermediate

There are advanced techniques that can be applied to Crystal forms customizations. These include , formulas and formula fields, "multi-use" logos and addresses, conditional suppression, advanced formatting, totals/subtotals, attachments and page footers among many others. Also, it is possible to pass additional data from Prophet 21 to the forms through the use of Custom Datastreams. These topics and others will be covered as well as discussion of best practices for customization and version management. Prior experience with Crystal is suggested.

Epicor Data Analytics: A Customer's Journey
Presented by Candice Powell, Regency Supply
Intermediate

Unlock the power of data-driven decision-making with Epicor Data Analytics (EDA)! In this session, we'll share a real-world journey of implementing EDA and explore how it has transformed business operations.

Attendees will gain insights into how EDA is leveraged to:

- Drive the right behaviors through data visibility and insights
- Improve efficiency by saving time on reporting and analysis
- Enhance accountability across teams with real-time metrics
- Enable smarter decision-making with actionable analytics

Join us for a behind-the-scenes look at how EDA can empower your organization to turn data into a strategic advantage.

Perfect for business leaders, IT professionals, and data-driven decision-makers looking to harness the full potential of Epicor Data Analytics.

Advanced Report Studio: Overcoming its shortfalls
Presented by Thomas Bodary, MindHARBOR, Inc.
Intermediate

For users ready to go beyond the basics. Report Studio is a powerful tool but it comes with a number of limitations. Find out how to get around those limits by learning how to join new data, work with calculated fields, utilize tokens and parameters and create summary reports.

Where to Find Data in P21
Presented by Thomas Bodary, MindHARBOR, Inc.
Beginner

Whether it's for building a report, modifying a form or creating a business rule, its important to understand how to find the data you need in SQL. This session will teach you the process of finding and starting point and tracing the data back to its source.

Label Printing & Customization Options
Presented by Thomas Bodary, MindHARBOR, Inc.
Intermediate

Learn how to design, troubleshoot, and optimize label printing in P21.

New Users/New to P21

The Power of Curiosity
Presented by Sharon Sale, Flodraulic Group
Beginner

This class is appropriate for new users to P21. It will cover how to use Customer Master Inquiry, Item Master Inquiry and Transaction Master Inquiry to run your business.

Customer Master Inquiry is your starting point to learn everything you need to know about a customer. The same is true for Items/Inventory in Item Master Inquiry and any location/company transactions in Transaction Master Inquiry. These multi-pronged screens provide a window into all the background details that are current in P21. This class is good for all user roles.

Data Conversion for Go-Live
Presented by Carolyn Hunt, Hunt Consulting Services
Intermediate

Plan and validate your data conversion effectively. Learn best practices for preparing item masters, customers, vendors, and open transactions.

Order Entry Basics for Non-Sales Users
Presented by Josh Novotny, The HMJ Group
Beginner

This course provides a practical introduction to Order Entry in P21 designed specifically for non-sales roles such as Operations, Accounting, and Purchasing.

Participants will gain a clear understanding of how order entry functions within P21 and how order data flows throughout the system—from initial order creation to pick ticket generation, shipping, and final invoicing.

What You'll Learn:

- Key components of the Order Entry screen
- Required vs. optional fields
- Customer, ship-to, and pricing basics
- How defaults and settings impact order creation
- Keyboard shortcuts and navigation tips
- Quick item lookup methods
- Copy orders from previous sales orders
- Time-saving entry methods and best practices
- How orders generate pick tickets
- Warehouse interactions and fulfillment steps
- Shipping confirmation process
- How and when invoices are created

I didn't know what I didn't know!
Presented by Carolyn Hunt, Hunt Consulting Services
Intermediate

Whether you are a new user or have worked with the Prophet 21 system for many years, there are often features within the programs you either never knew were there or forgot about them. This session covers features often overlooked in Order Entry, Purchasing, Accounting and Warehouse operations. Some are new features in newer releases; some have been around almost from the beginning. Add efficiency to your tasks and streamline processes by taking advantage of all the system has to offer.

Getting Started with P21: A Guided Overview
Presented by Jennifer Sagan, Singer Industrial
Beginner

A perfect place to start! Learn navigation basics, how to move between modules, find key information, and understand how core business processes connect across departments.

A Day in the Life: Order Entry
Presented by Jennifer Sagan, Singer Industrial
Beginner

Follow the order lifecycle from quote to invoice. Learn best practices for quoting, order follow-ups, and using inquiry screens to stay informed.

Error Prevention: Avoiding Common Setup Mistakes
Presented by Shannon Wilson, George E Booth Co.
Beginner

A checklist-style session for new implementations or admin audits, showing how small setup changes can prevent major headaches later.

WORKING COPY – NEW SESSIONS STILL TO BE ADDED

Efficient Inquiry Screens Overview (IMI, CMI, TMI, and More)
Presented by Shannon Wilson, George E Booth Co.
Beginner

Learn how to use the various inquiry screens effectively — understand what each screen does, when to use it, and how to interpret the information quickly.

Understanding Item Maintenance
Presented by Shannon Wilson, George E Booth Co.
Beginner

Almost every module touches Item Maintenance in some manner, so understanding Item Maintenance is crucial to your P21 environment's success. During this session, we will take an in-depth look at the Item Maintenance window, tabs, and fields.

Vendor Presentations

Sharing Information with Customers and Vendors Your Way
Presented by Grey Wolf Systems

Business today requires connecting with your trading partners and sharing information with them. By sharing information - business becomes more efficient, accurate and economical.

It's not only about customers and vendors anymore. With buying groups, marketplaces, ecommerce sites and traditional EDI - sharing with your trading partners needs to be consistent and accurate.

Transactional data (orders, invoices, etc) and static data (products, customers, etc) are the core of information sharing. Implementing the right sharing technology will position businesses for the future.

This presentation is intended to help you get on the right path to sharing with your partners thru business connectivity.

Audience:

- Buyers and Sales Reps working with vendors and customers
- IT and Operations implementing sharing technology

- Accounting and Finance wanting efficiencies from sharing
- Executives and Owners looking to the future of working with trading partners

Modernizing Financial Operations in P21: Practical Strategies for Today's Manufacturing & Distribution Teams
Presented by Service First Processing

Manufacturers and distributors operating in P21 face growing pressure to increase efficiency, improve cashflow, and meet evolving digital payment expectations. However, many teams still rely on manual payment entry, disconnected AR and AP workflows, and time-consuming reconciliation processes that limit visibility and slow financial operations.

This session explores the most common financial friction points within P21 environments and provides practical, real-world strategies to streamline payment acceptance, reduce manual effort, and strengthen financial accuracy. Attendees will learn industry standard best practices for modernizing receivables and payables processes, while maintaining existing ERP workflows.

We will also introduce Service First's newly available embedded payment acceptance integration within P21 as an example of how native tools can reduce errors, accelerate processing time, and improve the overall financial workflow without disrupting operations.

Optimizing and Designing Scalable EDI Integrations for Epicor Prophet 21
Presented by DCKAP

Electronic Data Interchange (EDI) plays a critical role in many Epicor Prophet 21 environments, yet EDI integrations can become complex to manage as trading partner requirements, transaction volumes, and business processes evolve. Without a scalable integration approach, organizations often face increased manual intervention, higher maintenance effort, and limited visibility into EDI transactions.

This session focuses on how Epicor Prophet 21 users can optimize and design scalable EDI integrations using the DCKAP Integrator. The session will cover key architectural concepts, best practices for managing multiple trading partners, and strategies for handling varying EDI standards and partner-specific requirements.

AI-Driven Supply Chain Efficiency in P21: From Forecasting to S&OP
Presented by Slimstock

Supply Chain leaders create a vision for the supply chain and their team execute against that vision. Making improvements can seem like a challenge until you find an efficient way to dial in your supply chain.

The team at Slimstock will show how day-to-day supply chain operational efficiency can create lasting improvements and can empower the strategic improvements that leaders are looking for.

Join our session to learn how companies can improve their efficiency and accuracy in Forecasting, Demand Planning, Inventory, Supply Planning, Purchasing, and even Sales and Operations Planning.

Improving the day to day can lead to lasting improvements that make the strategic improvements achievable. Join our experts to hear how your supply chain goals can efficiently go from a future wish to an achieved result.

Beyond the box: Building a Smarter Supply Chain on P21- Modular Portals, Automation, and AI-Enabled Planning
Presented by MindHARBOR, Inc.

In this session we'll walk through real-world Prophet 21 projects, architecture patterns, and lessons learned from distributors extending their ERP environments to support modern supply chain operations.

Topics include:

- Building customer and vendor portals that integrate directly with P21
- Connecting ERP to external platforms using APIs and modern integration architectures
- Automating manual workflows across sales, purchasing, and operations
- Improving data visibility and operational intelligence across the supply chain
- Preparing ERP environments for AI-driven planning and analytics
- Managing data governance and interoperability as ERP ecosystems evolve toward SaaS and API-driven models

Attendees will leave with practical ideas, architecture models, and project examples they can apply to their own Prophet 21 environments.

Beyond Standard P21: Automating Your Business With the Prophet 21 API

Presented by Echopath

Prophet 21 sits at the center of many distribution businesses, but many critical processes still rely on manual work or disconnected systems. The P21 API provides a powerful way to automate workflows and connect Prophet 21 with the rest of your technology stack.

In this session, Echopath will introduce the key capabilities of the Prophet 21 API and demonstrate how organizations are using it to solve real operational challenges. We will walk through practical examples including large scale order automation, integrations with warehouse systems like CribMaster, and how API based integrations power document automation platforms such as Esker.

Attendees will gain a clearer understanding of what is possible with the P21 API, how modern integrations are typically designed, and how businesses can extend Prophet 21 to support automation and more efficient workflows.

Smarter Decisions: Turning Inventory Data into Daily Action
Presented by Recurrency

Distributors today have no shortage of data. From ERP dashboards to spreadsheets and BI tools, teams are surrounded by information about their inventory and operations. Yet many organizations still struggle to turn that information into consistent, timely decisions. With limited time and endless reports to review, it's easy for teams to fall into reactive firefighting.

In this session, we'll explore how high-performing distributors move beyond static reporting to build operational workflows that surface the most important inventory risks and opportunities each day. By structuring work around prioritized actions instead of static reports, teams can reduce decision fatigue, respond faster to changing conditions, and create a more consistent daily operating rhythm.

This session will focus on practical approaches Recurrency gives distributors to make their operations more proactive, scalable, and data-driven.

Smarter Finance, Faster Outcomes: Esker & Enlighten.Net for the Office of the CFO
Presented by Enlighten.Net, Inc.

In today's P21 driven distribution environment, finance teams face increasing pressure to do more with less—manage cashflow, improve customer experience, and streamline order to cash and procure to pay processes with accuracy and speed. This breakout

session showcases how Esker and Enlighten.Net deliver powerful, AI enabled automation that transforms Accounts Payable, Accounts Receivable, and Order Entry operations.

Join us to see how P21 users reduce manual touchpoints, gain real time visibility into financial workflows, and create smarter, faster outcomes across the business. You'll learn how AI acts as a co-pilot to strengthen decision making, improve productivity, and support the financial stability and scalability your organization needs.

Whether you're looking to modernize AP/AR, accelerate order processing, or build a more resilient finance operation, this session equips you with actionable insights and proven strategies to elevate performance and empower your organization.

P21 Payments Reimagined: Secure, Seamless & Scalable Innovation to Accelerate Revenue
Presented by Unified A/R

If you're still relying on manual P21 order-to-cash processes, it's time to rethink what's possible. Accounting, IT & C-Suite Leaders should join us as we showcase the newest A/R Automation enhancements built specifically for Epicor P21.

Discover how modern, modular solutions will empower both your customers & your team—simplifying payments, strengthening security, and accelerating revenue.

Get a first look at powerful new capabilities designed by P21 experts to support every way your customers pay: Terms, COD, eCommerce & more, including:

- eCommerce & shopping cart support with secure SSO & seamless checkout
- Interactive HTML eInvoices & statements delivered directly to your customers' inboxes, complete with secure payment links
- Automated & scheduled payment options so your customers never miss a due date
- Lockbox payment-to-remittance conversion to eliminate manual cash application
- Client Central, your unified hub for complete invoice, payment, & account visibility.

Ecommerce That Actually Works: Real Lessons from the Front Lines of Implementation
Presented by Aldrich Web Solutions

Launching e-commerce isn't just about choosing the right platform, it's about understanding what it really takes to make it work for your customers. In this interactive roundtable, Aldrich Web Solutions, technology partners, and distributors will discuss real-world lessons from e-commerce and digital transformation projects in Epicor Prophet 21 environments. We'll discuss practical insights on selecting technology providers, preparing your organization for implementation, and avoiding common pitfalls that delay or derail ecommerce initiatives. Topics include misconceptions distributors have about technology, what separates successful implementations from failed ones, and which industry trends may be more hype than value. Whether you're launching your first e-commerce site or upgrading an existing one, this session will provide candid advice and proven best practices to help you get your website live and selling!

Making Your Data Work for You: Translating Your ERP Data Into Action
Presented by Rubber Tree Systems

Your ERP contains some of the most valuable information in your business, but for many distributors, turning that data into actionable insight can feel like trying to read an ancient language(Think the Egyptian Hieroglyphs before the Rosetta Stone!) Translating it into something your team can easily understand and act on isn't always simple because the meaning exists, but the information can feel locked away.

For many distributors, ERP systems are the same: packed with valuable data, yet buried in reports and tables that few people know how to interpret.

In this session, we'll explore how distributors can translate ERP data into meaningful insights that drive growth and improve performance. Through real-world scenarios, we'll share practical examples of how companies use Rubber Tree Systems to turn ERP data into tools that help teams better understand customers, identify opportunities, and make more informed decisions.

From Pack to Ship/Deliver – The flow of goods and data for the modern distributor.
Presented by ShipLink

Join ShipLink CEO Glenn Stewart as he presents automation concepts for Prophet 21 users who are interested in more efficient pack, ship and deliver methods. These methods should provide users the ability to speed the physical flow of goods while simultaneously ensuring data accuracy.

The Digital Distributor: Connecting eCommerce, Pricing, and Sales Technology
Presented by WebPresented

Distributors are investing in more technology than ever before, from ERP and eCommerce platforms to pricing tools, marketing systems, and analytics solutions. While each system plays an important role, many organizations face a new challenge: customer information is scattered across multiple platforms. Sales and customer service teams often struggle to see the full picture of what's happening with their accounts, orders, activities, online purchasing behavior, and pricing insights in other systems.

In this session, WebPresented will explore how distributors are managing this expanding technology ecosystem and why CRM is becoming the central hub for customer intelligence and sales activity.

Topics include:

- Why distributor technology stacks are expanding
- Challenges when customer data lives in multiple systems
- How CRM unifies insights across ERP, eCommerce, and other platforms
- Why visibility into customer activity is critical for sales and service

Roundtables

Assessing Your AI Maturity: Where Are You and What's Next?
Facilitated by Meghan Richardson, Hallman Consulting & Services Ltd.

Forget the marketing brochures — where does your organization actually stand on AI? Take a quick AI Maturity Pulse Check across six dimensions, then open the floor for honest, peer-to-peer conversation that doesn't happen in lecture halls. What's working. What's stalling. What your peers are doing that you haven't tried yet. Come ready to share, listen, and leave with clarity on your next move.

SQL Server Roundtable - Let's talk about SQL Server! Bring your questions, your problems, and your ideas and get feedback from your peers.

Cybersecurity Roundtable - What concerns you about cybersecurity? What works and what doesn't? Bring your questions and get feedback from your peers.

System Admin Roundtable/P21 Updates - The Prophet 21 WebUI certainly changed a lot of things for the user base, adding new abilities but also bringing new challenges. This session is for you if you're a System Admin interested in sharing challenges and solutions.

Purchasing Roundtable - Join other WWUG members as we delve into effective purchasing methodologies, supplier relationship management, cost-saving initiatives, and emerging technologies revolutionizing procurement practices.

New User Roundtable - A moderated yet free and open discussion on issues unique to new users both before and after go-live. This session is suitable for people from those just beginning the go-live process through those who have been live on it for up to a year. It is also suitable for long term P21 users willing to offer advice to the next generation of P21 experts.

Accounting Roundtable
Facilitated by Peter Chrobak, Duncan-Parnell

Unlock the power of numbers at our Accounting Roundtable Discussion! Join other finance professionals as we explore the latest trends, challenges, and innovations shaping the world of accounting, both in and outside of P21. Engage in stimulating conversations, share best practices, and gain actionable insights from your peers.

API Roundtable- Let's dive into topics such as API design, implementation best practices, security considerations, and the role of APIs in your business. Don't miss out on this interactive forum where ideas flow freely and connections are made.

Automation Studio Roundtable - Use Cases, Recipe Sharing & Brainstorming
Presented by Jeff Poss, Auer Steel & Heating Supply
Advanced

Is your company using or about to use Automation Studio? Come meet other users that are using the program already to automate workflows and processes in their company.

During this open discussion we will go through and ask about key business areas and learn how companies are using Automation Studio to help.

We will also talk about recipes where companies are stuck / running into issues. This will also be a chance to brainstorm and share ideas your company wants to implement to see if someone in the room can help.

WMS Roundtable – New or struggling with WMS? Come share your challenges with other WWUG members, let's learn together!

Assemblies and Kits Roundtable - Delve into topics such as supply chain optimization, inventory management, customization challenges, and lean manufacturing principles tailored specifically for assemblies and kits. Engage in lively discussions, share best practices, and gain valuable insights from peers and thought leaders in the field.

Cloud Migration Roundtable - Do you have questions or concerns about moving to the cloud? Join us as we share next steps and best practices.